

10-Point Pre-Offshoring Checklist

1. Define clear roles and responsibilities for your offshore team.
2. Document up-to-date SOPs for all major workflows.
3. Establish communication channels and tools (email, chat, PM tools).
4. Set expectations for overlap hours and meeting cadence.
5. Ensure access to required software, tools, and permissions.
6. Map task ownership and escalation paths.
7. Prepare training materials and schedule onboarding sessions.
8. Align on quality standards and review processes.
9. Create a measurable KPI and performance tracking framework.
10. Plan for resource continuity, backups, and knowledge transfer.